Lead Manager: Agency Best Practices

In order to help agencies more successfully use Lead Manager, we have outlined the recommended best practices for various customizable sections of the tool.

Administration My Company

Shark Tank

Shark Tank is a feature where unassigned leads are available for users to grab as they are entered into the system

Recommendations:

- Admins can enable the Shark Tank to receive all unassigned leads or unassigned web leads.
  - Shark Tank can be a good tool for experienced LSPs to work on time sensitive leads if the LSPs are available to work it right away.
  - It is NOT recommended to use Shark Tank for new LSPs; instead use the features in Lead Manager to assign leads.

eAgent

eAgent integration allows agencies to customize when a lead should move from Lead Manager into eAgent.

Recommendation:

- Keep this integration off.
  - Alliance will pass a lead when bound or at personalized proposals to eAgent automatically, keeping this integration off will help avoid duplication in eAgent.

Notification Popups

Notification popups allow for reminders and notifications of leads entering the system and scheduled appointments.

Recommendation:

- Notification pop-up settings should be enabled to let users know if they have an appointment or new leads.

Administration Manage Users

Managing Users Settings

When adding users, agencies will need to decide what level of system access each user should receive.

Recommendations:

- When adding an LSP or staff member, the Agent should use the employee's NTID as their username
  - If the staff member you are adding is going to play a large part in office management or lead assignment, we recommend you set them as an admin.
  - If the staff member you are adding is going to only be focused on working leads assigned to them and has no need to access system admin features, we recommend you set that as a user.

Administration Workflows

Workflows

Lead Manager offers automated workflows for Agencies to manage their contact strategy, with differing strategies based on priority

Recommendation:

- Agencies should turn ON all of the offered workflows within Lead Manager as each has been designed for different types of leads.
- Users will still need to disposition all leads under the history tab under each individual lead.

Administration Reporting

Reporting

To get the most valuable reports for your agency, there are two avenues to get data.

Recommendations:

- Lead Manager has activity level reporting, lead activity reporting and workflow reporting.
- The Lead Activity Tool has reporting on the quote and bind rates for your agency.
    - Lead Manager users will only need to access the Lead Activity Tool for reporting. All lists on the Lead Activity Tool will automatically be uploaded on Lead Manager.

My Account

My Account Settings

Each user has the ability to customize their own account settings.

Recommendations:

- Users should update their idle/time out settings to a minimum of 2 hours.
- Notification settings should be updated and active to alert users for new leads or appointments.

If you have any questions on Lead Manager, please email LeadManager@Allstate.com.
If you have any questions on Lead Activity tool, please email LeadActivityToolQuestions@allstate.com.